Manage Peer Access Permissions

1   Introduction

Institutions seeking funding from the Department of Energy's (DOE) Office of Science (SC), or with active funding, will have a variety of Preproposals, Letters of Intent (LOIs), Proposals, and Awards. Throughout the lifecycle of any of these resources, a user within the organization may require access to assist with a submission or related activities. The Admin Sponsored Research Officer (SRO) at the institution has permissions to Manage Peer Access, granting users at the institution permissions to view, edit, delete, submit, or manage peer access themselves.

The purpose of this document is to provide step-by-step instructions for users to follow to Manage Peer Access for users registered to their institution.

2   Prerequisites

Before a user can Manage Peer Access, the following criteria must be met:

- The user has an active, external PAMS account.
- The user is an Admin SRO at the institution with the Manage Users, Submit to DOE, and Manage Institution Profile Permissions.
  OR
- The user has Manage Users Privileges, or has submitted the resource (Preproposal, LOI, Proposal).

3   Managing Peer Access

Most often, peer access is managed by resource. Use the following steps to Manage Peer Access for Preproposals, Letters of Intent (LOI), Proposals, and Awards.

1. Log in to your external PAMS account at (Figure 1): https://pamspublic.science.energy.gov/webpamsepsexternal/login.aspx

Figure 1. PAMS External Login

2. PAMS will load the homepage (*Figure 2*). From here, you must decide which resource you would like to manage. To manage Preproposals, continue to the next section. To manage LOIs, skip ahead to *Section 3.2 Manage Letters of Intent (LOI)*. To manage Proposals, skip ahead to *Section 3.3 Manage Proposals*. To manage Awards, skip ahead to *Section 3.4 Manage Awards*.

3.1   Managing My Preproposals

Use the following steps to manage peer access for Preproposals.

1. Click **View My Preproposals** under the "Common Actions" section on the right side of the page (Figure 2).
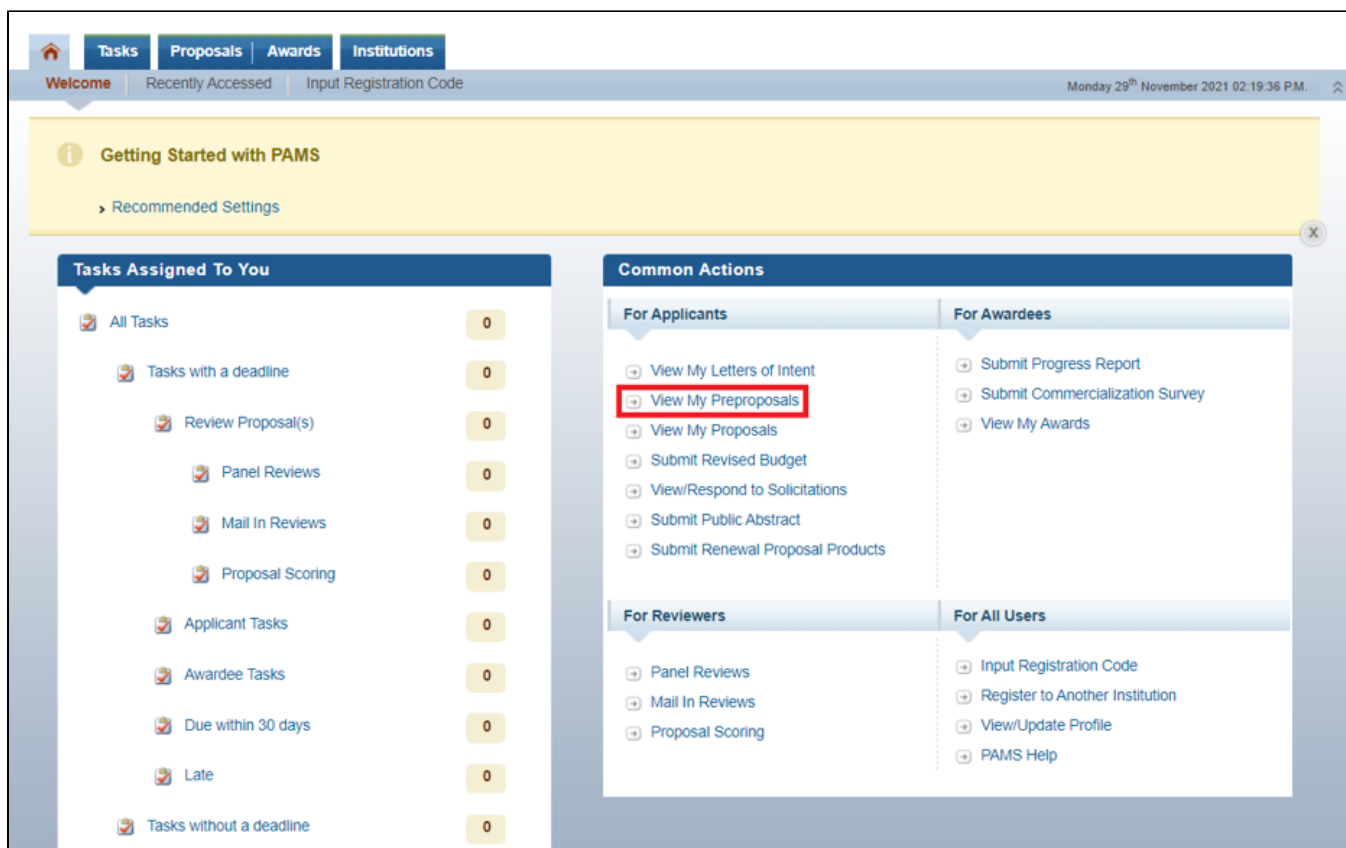
Figure 2. PAMS Homepage, View My Preproposals

2. PAMS will navigate you to the "My Preproposals" page, which lists all of the Preproposals assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the Preproposal for which you would like to manage peer access. Once you have located the Preproposal, click **Manage Peer Access** in the **Actions/Views** menu in the Options column (Figure 3).
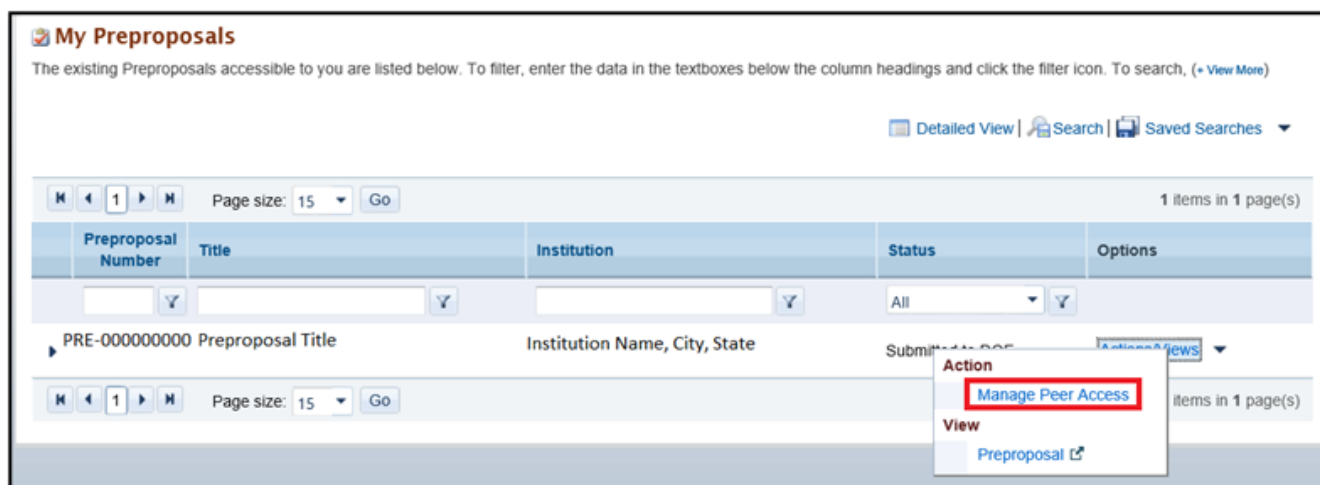

Figure 3. My Preproposals, Manage Peer Access

3. PAMS will navigate you to the "Manage Peer Access – User List" page, which lists every user with access to the Preproposal (Figure 4).

Figure 4. Manage Peer Access – User List, Manage Peer Access By Preproposal

3.1.1 Managing Peer Access for Preproposals

Use the following steps to manage a user who already has access to the Preproposal.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 4).

2. PAMS will navigate you to the "Manage Peer Access – User" page, which displays the user's current permissions on the Preproposal. All users, including new users, on the Preproposal will possess the View permission, but current users may also possess the Edit, Submit, Delete, or Manage Peer Access permissions. Select the checkbox for each additional permission you would like to grant the user(s) (Figure 5).

3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page (Figure 5).

Figure 5. Manage Peer Access – User, Update Peer Access By Preproposal

4. PAMS will return you to the "Manage Peer Access – User List" page and display a Success message confirming that the user's peer access privileges have been updated successfully (Figure 6).

Figure 6. Manage Peer Access – User List, Success

3.1.2 Adding a User to the Preproposal

If you do not see the user whose access you would like to manage in the list (Figure 4), the user does not have access to the Preproposal. Use the following steps to add a user to the Preproposal.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the preproposal and manage their access (Figure 4).

2. PAMS will navigate you to the "Manage Peer Access – Add User" page, which lists users from your institution that do not currently have access to the Preproposal. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the checkboxes by the users' names or the **Select all/Unselect all** feature to select the user(s) you want to add to the Preproposal. (Figure 7)

3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page.

Figure 7. Manage Peer Access – Add User By Preproposal

4. PAMS will return you to the "Manage Peer Access – User" page, follow steps 2 - 4 in section 3.1.1, Managing Peer Access for Preproposals, to designate the appropriate privileges for the users you are adding to the Preproposal.

3.2   Managing My Letters of Intent (LOI)

Use the following steps to manage peer access on LOIs.

1. Click **View My Letters of Intent** under the "Common Actions" section on the right side of the page (Figure 8).
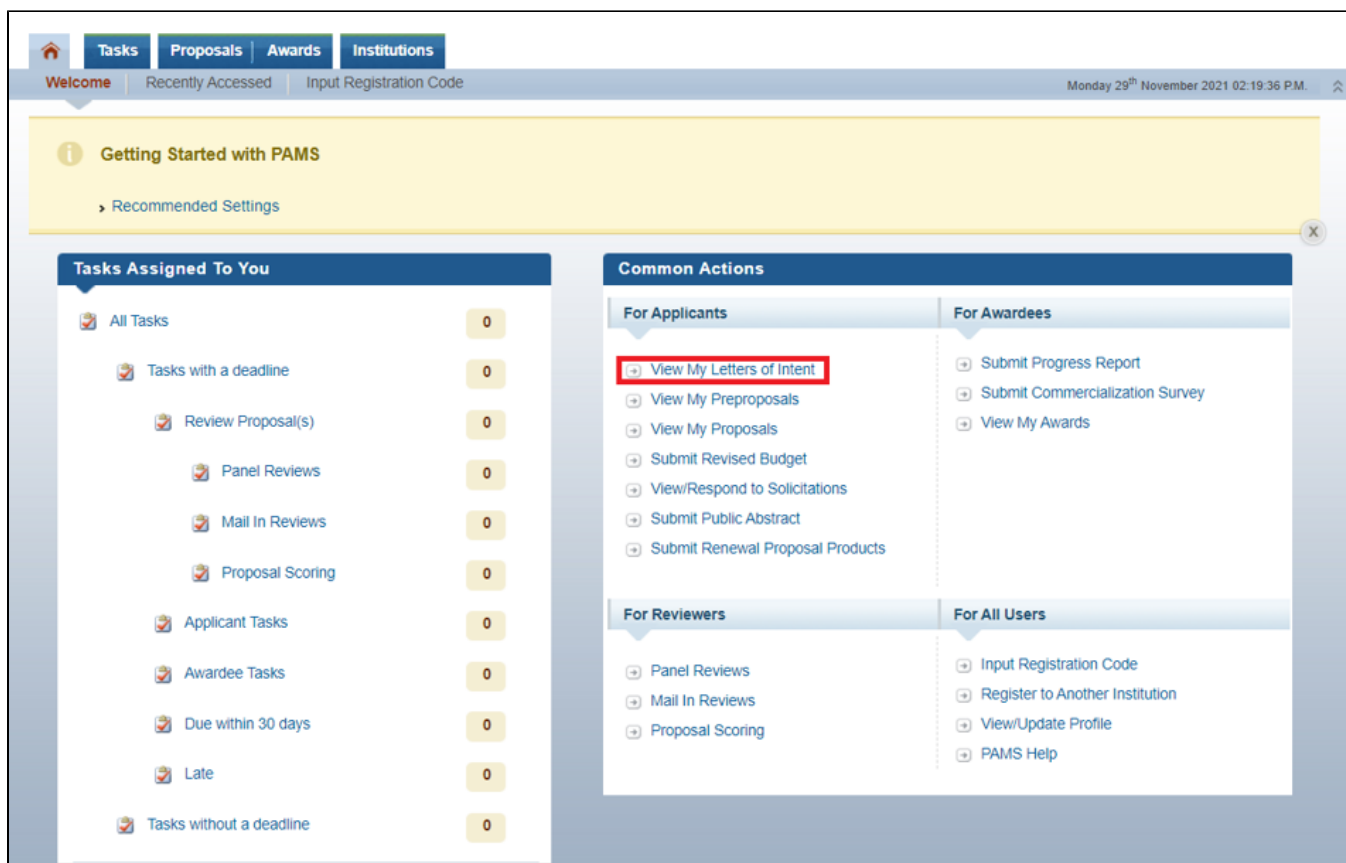
Figure 8. PAMS Homepage, View My Letters of Intent (LOI)

2. PAMS will navigate you to the "My Letters of Intent (LOI)" page, which displays all of the LOIs that are assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the LOI for which you would like to manage peer access. Once you have located the LOI, click **Manage Peer Access** in the **Actions/Views** menu in the Options column (Figure 9).
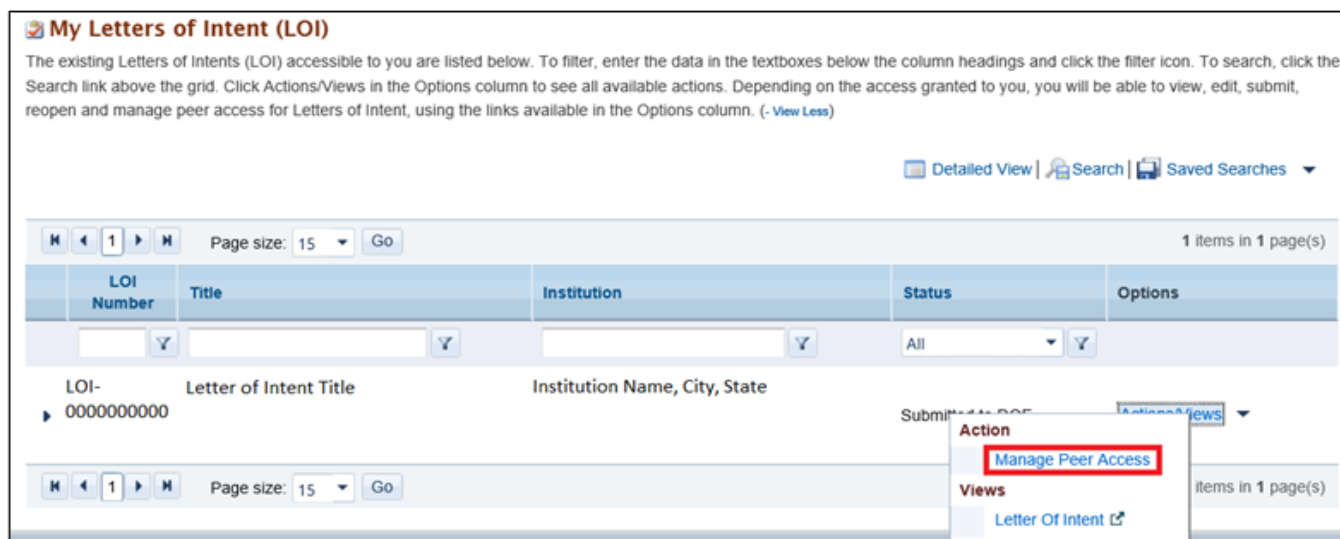
Figure 9. My Letters of Intent (LOI), Manage Peer Access

3. PAMS will navigate you to the "Manage Peer Access – User List" page, which lists every user with access to the LOI (*Figure 10*).

Figure 10. Manage Peer Access – User List, Manage Peer Access By LOI

3.2.1 Managing Peer Access for LOIs

Use the following steps to manage a user who already has access to the LOI.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 10).

2. PAMS will navigate you to the "Manage Peer Access – User" page, which displays the user's current permissions on the LOI. All users, including new users, on the LOI will possess the View permission, but current users may also possess the Edits, Submit, Delete, or Manage Peer Access permissions. Select the checkbox for each additional permission you would like to grant the user(s) (Figure 11).

3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Figure 11. Manage Peer Access – Users Access, Permissions

4. PAMS will return you to the "Manage Peer Access – User List" page and display a Success message confirming that the user's peer access privileges have been updated successfully. (Figure 12)

Figure 12. Manage Peer Access – User List, Success

3.2.2   Adding a User to the LOI

If you do not see the user whose access you would like to manage in the list (Figure 10), the user does not have access to the LOI. Use the following steps to add a user to the LOI.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the LOI and manage their access (Figure 10).

2. PAMS will navigate you to the "Manage Peer Access – Add User" page, which lists users from your Institution that do not currently have access to the LOI. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the check boxes by the users' name or **Select all/Unselect all** to select the user(s) you want to add to the LOI (Figure 13).\

3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page (Figure 13).

Figure 13. Manage Peer Access – Add User – By LOI

4. PAMS will return you to the "Manage Peer Access – User" page , follow steps 2 - 4 in section 3.2.1, Managing Peer Access for LOIs, to designate the appropriate privileges for the users you are adding to the Letter of Intent.

3.3   Managing My Proposals

Use the following steps to manage peer access for Proposals.

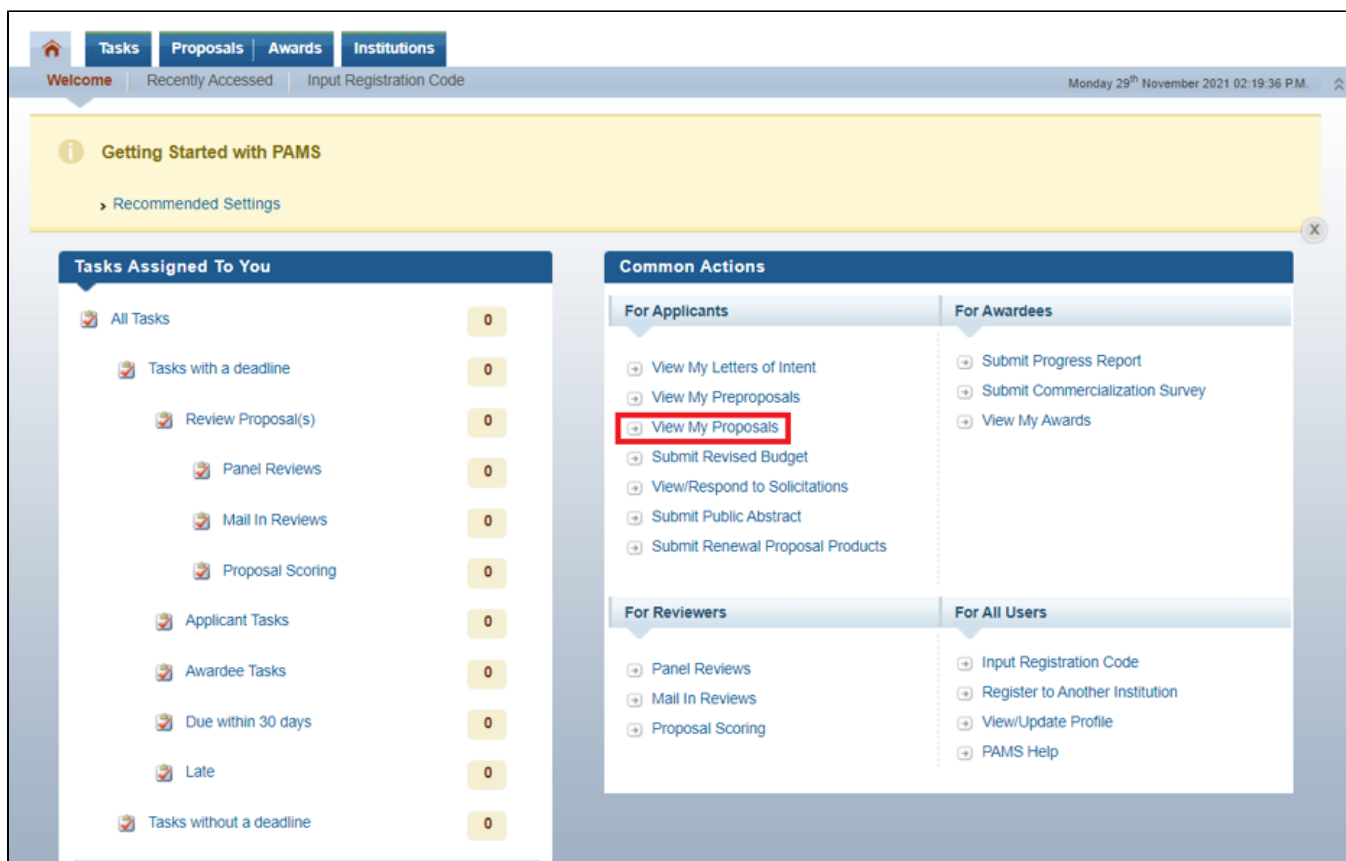1. Click **View My Proposals** under the "Common Actions" section on the right side of the page (Figure 14).

Figure 14. PAMS Homepage, View My Proposals

2. PAMS will navigate you to the "My Proposals" page, which displays all of the Proposals that are assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the Proposals for which you would like to manage peer access. Once you have located the Proposal, click **Manage Peer Access** in the **Actions/Views** menu in the Options column (Figure 15).
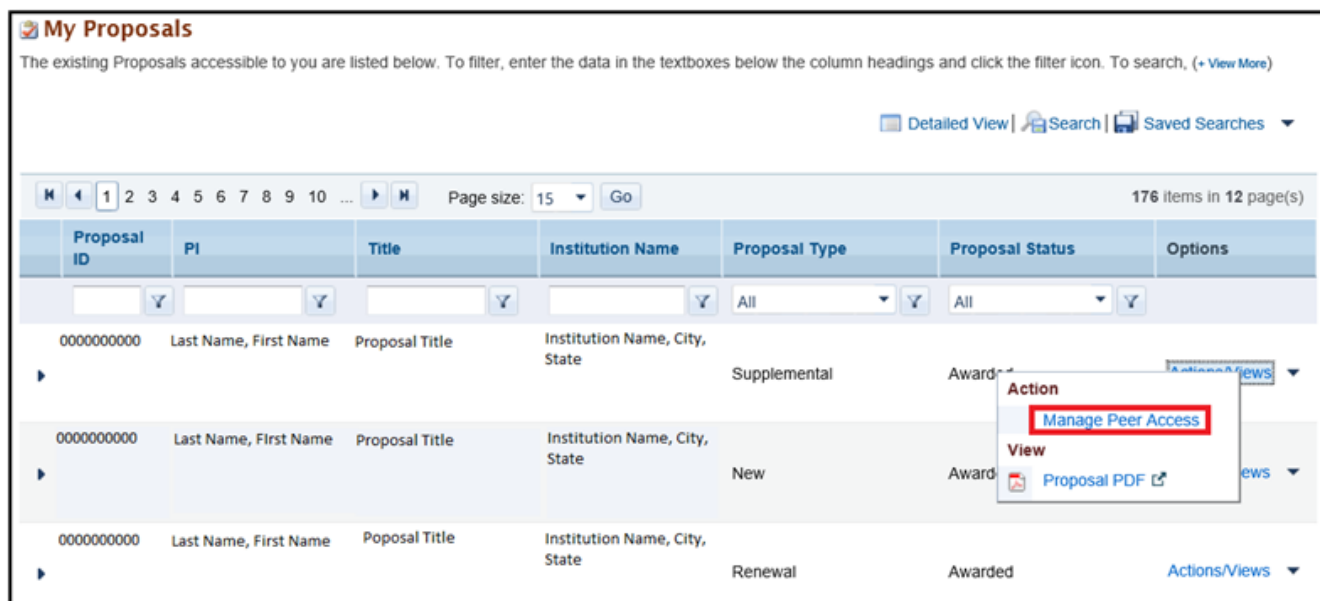
Figure 15. My Proposals, Manage Peer Access

3. PAMS will navigate you to the "Manage Peer Access – User List" page, which lists every user with access to the Proposal (Figure 16).

Figure 16. Manage Peer Access – User List, Manage Peer Access

3.3.1   Managing Peer Access for Proposals

Use the following steps to manage a user who already has access to the Preproposal.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 16).

2. PAMS will navigate you to the "Manage Peer Access – User" page, which displays the user's current permissions on the Proposal. All users, including new users, on the Proposal will possess the View permission, but current users may also possess the Edit, Submit, Delete, or Manage Peer Access permissions. Select the checkbox for each additional permission you would like to grant the user(s) (Figure 17).

3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Figure 17. Manage Peer Access – Users, Permissions

4. PAMS will return you to the "Manage Peer Access – User List" page and display a Success message confirming that the user's peer access privileges have been updated successfully (Figure 18).

Figure 18. Manage Peer Access – User List, Success

3.3.2   Adding a User to the Proposal

If you do not see the user whose access you would like to manage in the list (Figure 16), the user does not have access to the Proposal. Use the following steps to add a user to the Proposal.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the proposal and manage their access (Figure 16).

2. PAMS will navigate you to the "Manage Peer Access – Add User" page, which lists users from your Institution that do not currently have access to the Proposal. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the checkboxes by the users' names or **Select all/Unselect all** to select the user(s) you want to add to the Proposal (Figure 19).

3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page (Figure 19).

Figure 19. Manage Peer Access – Add User – By Proposal

4. PAMS will return you to the "Manage Peer Access – User" page, follow steps 2 - 4 in section 3.3.1, Managing Peer Access for Proposals, to designate the appropriate privileges for the users you are adding to the Proposal.

3.4   Managing My Awards

Use the following steps to manage peer access for Awards.

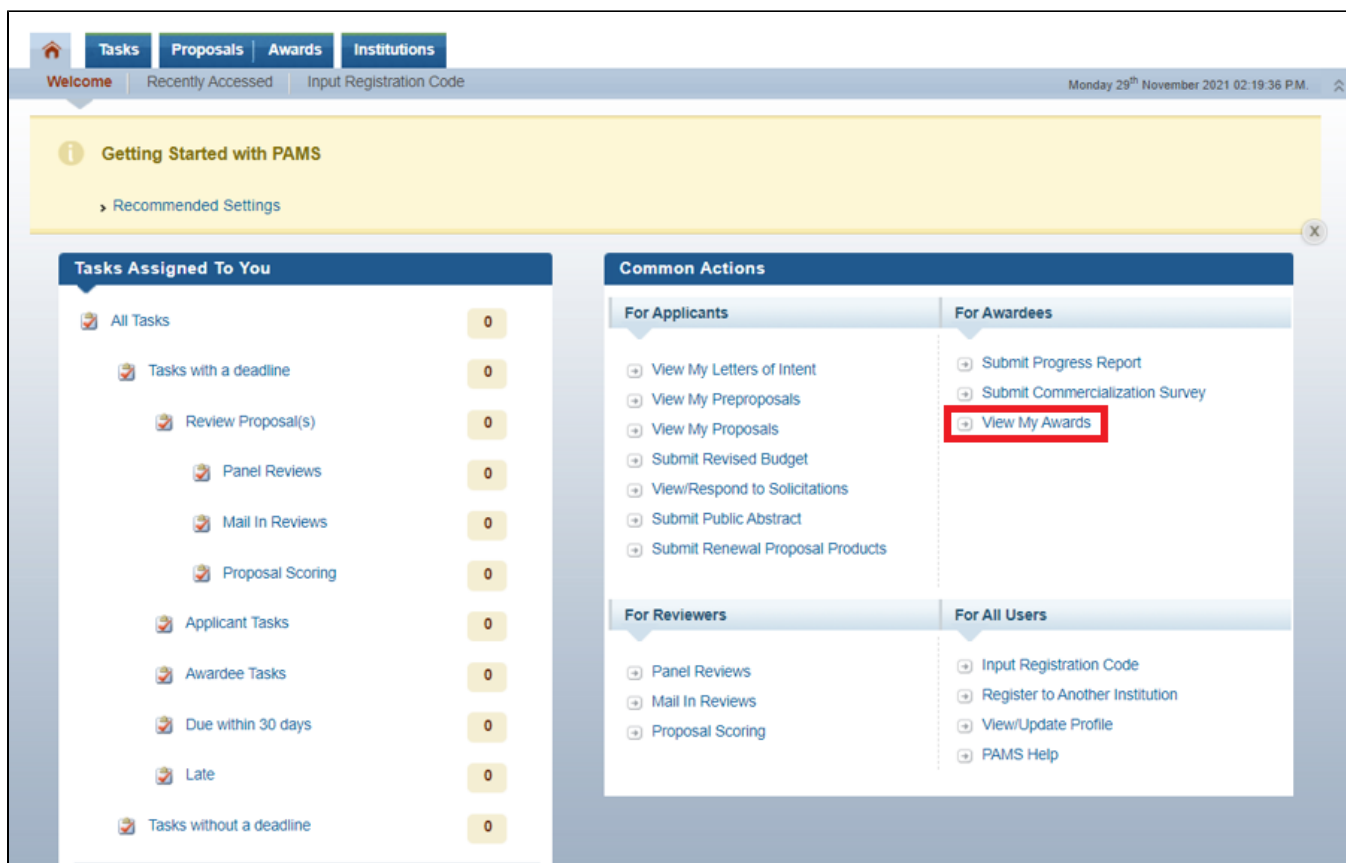1. Click **View My Awards** under the "Common Actions" section on the right side of the page (Figure 20).

Figure 20. PAMS Homepage, View My Awards

2. PAMS will navigate you to the "My Awards – List" page, which displays all of the Awards that are assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the Award for which you would like to manage peer access. Once you have located the Award, click **Manage Users** in the **Actions/Views** menu in the Options column (Figure 21).
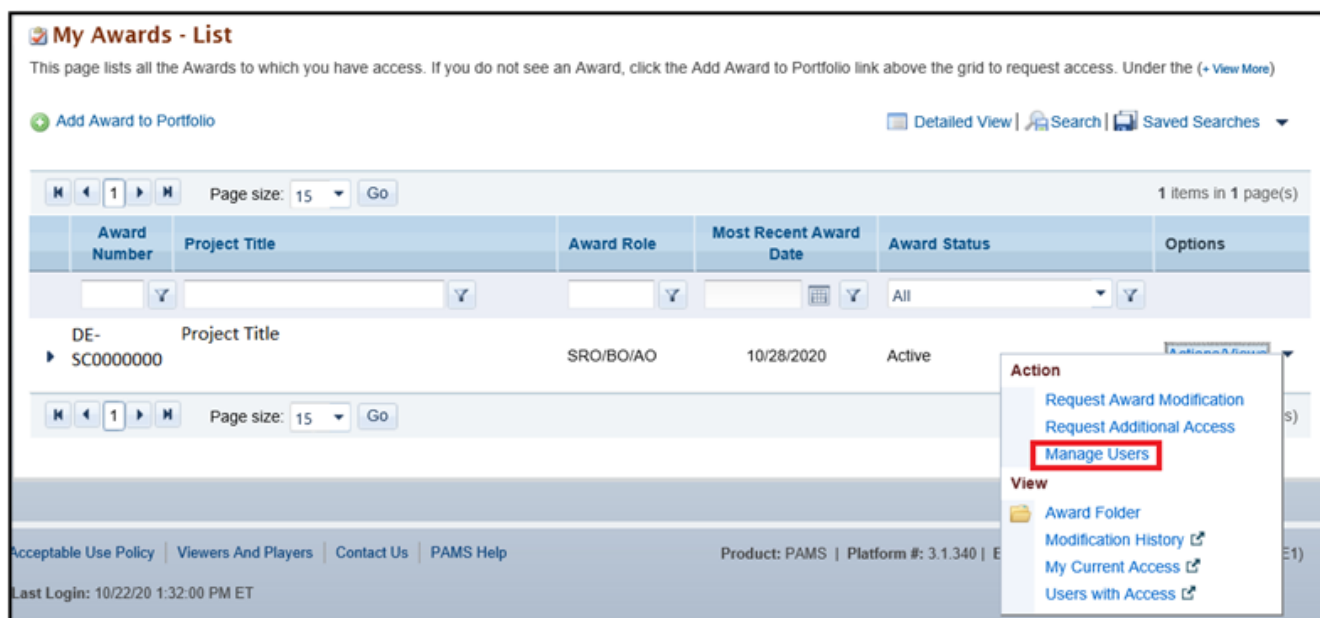
Figure 21. My Awards – List, Manage Users

3. PAMS will navigate you to the "Users – List" page, which lists every user with access to the Award (*Figure 22*).

Figure 22. Users – List, Update

3.4.1   Manage Peer Access for Awards

Use the following steps to manage a user who already has access to the Award.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Update** in the **Actions/Views** menu in the Options column (Figure 22).

2. PAMS will navigate you to the "Awards – Update User Access" page, which displays the user's current permissions on the Award. All users, including new users, on the Award will possess the View permission, but current users may also possess the Create, Edit, Submit, Delete, and Administer permissions. Select the checkbox for each additional permission for Award Modification Requests you would like to grant the user (Figure 23).

3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Figure 23. Awards – Update User Access, Permissions

4. PAMS will return you to the "User – List" page and display a Success message confirming that the user's access has been updated successfully (Figure 24).

Figure 24. Awards – Success

3.4.2   Adding a User to the Award

If you do not see the user whose access you would like to manage in the list (Figure 22), the user does not have access to the Award. Use the following steps to add a user to the Award.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the Award and manage their access (Figure 22).\

2. PAMS will navigate you to the "Awards – Add User" page, which lists users from your institution that do not currently have access to the Award. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the checkboxes by the users' names or **Select all/Unselect all** to select the user(s) you want to add to the Award (Figure 25).

3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page (Figure 25).

Figure 25. Awards – Add User

4. PAMS will return you to the "Awards – Add User Access" page, follow steps 2 - 4 in section 3.4.1, Managing Peer Access for Awards, to designate the appropriate privileges for the users you are adding to the Proposal.

3.5 Institution – Manage Users

If you do not want to manage users' peer access by resource, you can also manage users at the institution level. Use the following steps to manage users from the Institution Tab.

1. To manage a user by institution, navigate to the Institutions tab (Figure 26).
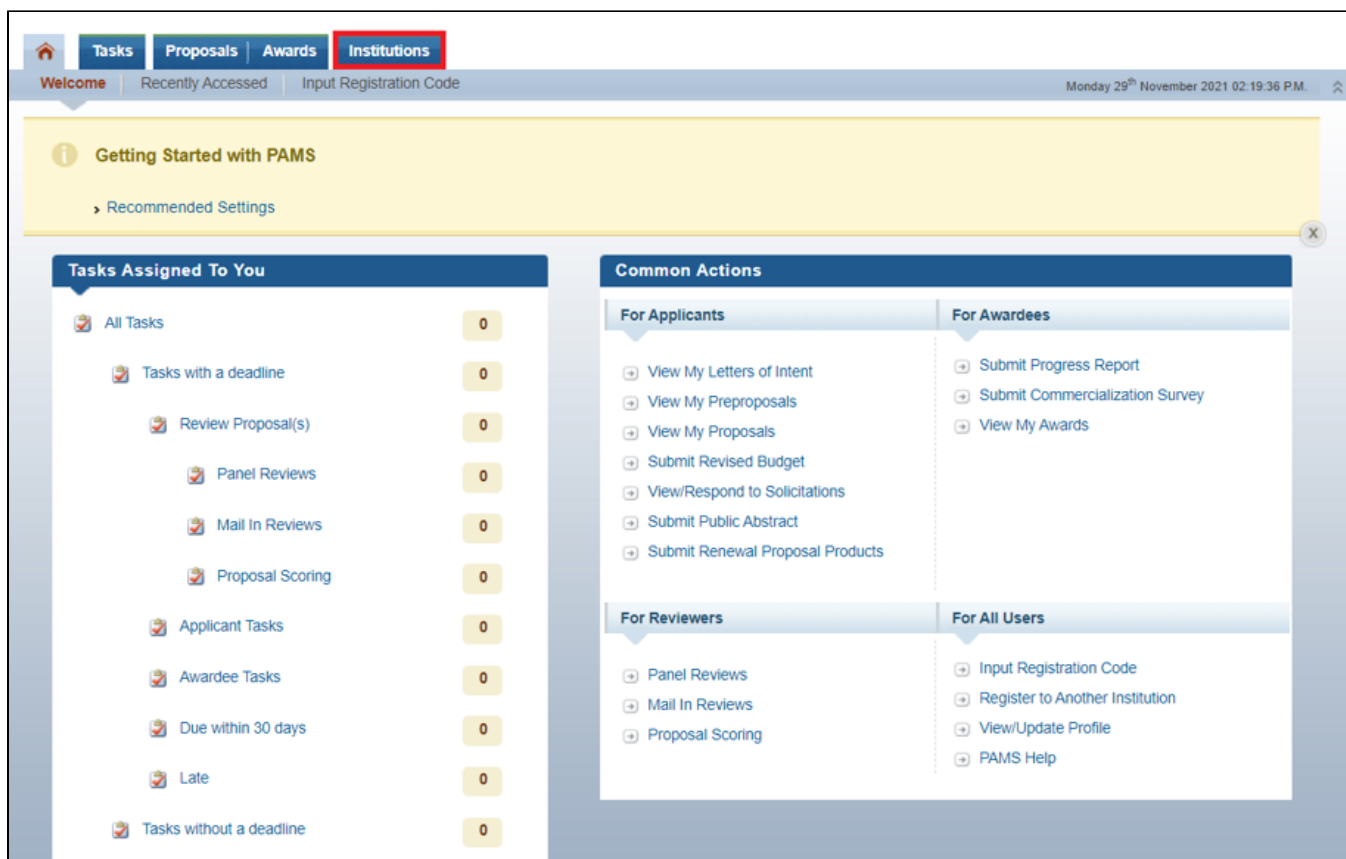
Figure 26. PAMS Homepage – Institutions Tab

2. PAMS will load the "Institutions – List" page, which displays all of the institutions you are registered to in PAMS. Choose an institution and select **Manage Users** in the **Actions/Views** menu in the Options column (Figure 27).
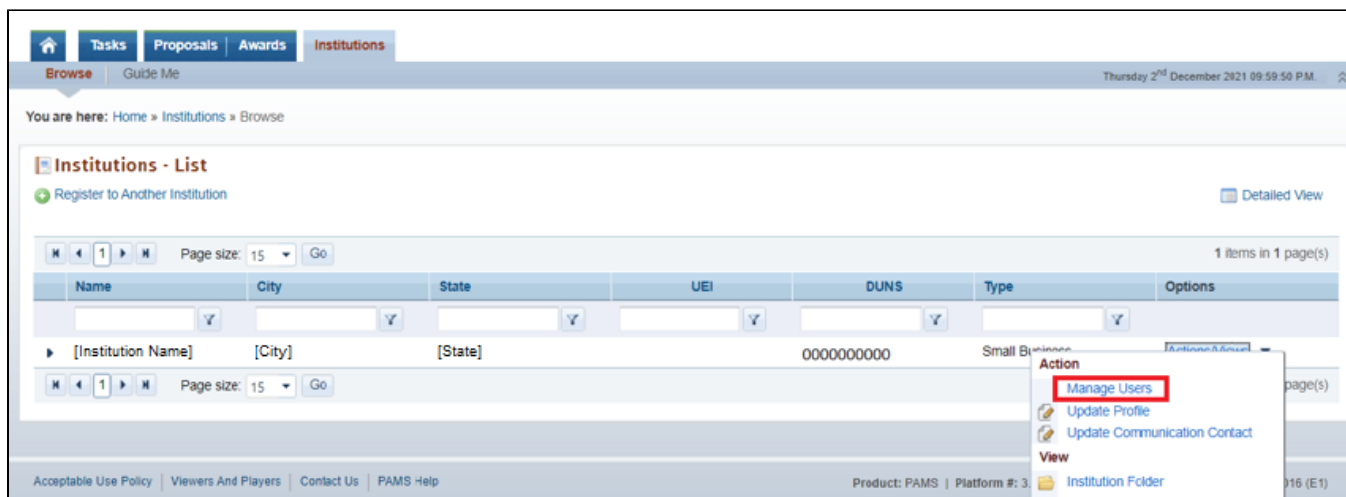

Figure 27. Institution – List, Manage Users

3. PAMS will navigate to the "Manage Users" page. There are five Manage Users options: **By Letter of Intent**, **By Preproposal**, **By Proposal**, **By Award**, and **By Users**. To perform one of these Manage Users actions, click the magnifying glass for the resource of choice (Figure 28).

Figure 28. Manage Users

3.5.1   By Letter of Intent

Upon selecting **By Letter of Intent** on the "Manage Users" page, PAMS will load search parameters.

1. Enter the LOI Tracking Number, Project Title (like), or Solicitation Number (like), and click **Search** to narrow your LOI results
OR
Click **Search** with no parameter to search all LOIs submitted by your institution (Figure 29).

Figure 29. Manage Users, By Letter of Intent

2. PAMS will navigate to the "Manage Users – Letters of Intent" page. Browse the list or use the filters or advanced search above the grid to locate the LOI for which you would like to manage peer access. Once you have located the LOI, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 30).

Figure 30. Manage Users – Letters of Intent, Manage Peer Access

3. Refer to *Section 3.2 Managing My Letters of Intent*, steps 3-6 above.

3.5.2   By Preproposal

Upon selecting **By Preproposal** on the "Manage Users" page, PAMS will load search parameters.

1. Enter the Preproposal Tracking Number, Project Title (like), or Solicitation Number (like), and click **Search** to narrow your preproposal results
OR
Click **Search** with no parameters to search all Preproposals submitted by your institution (Figure 31).

Figure 31. Manage Users By Preproposal

2. PAMS will navigate to the "Manage Users – Preproposals" page. Browse the list or use the filters or advanced search above the grid to locate the Preproposal for which you would like to manage peer access. Once you have located the Preproposal, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 32).

Figure 32. Manage Users – Preproposals, Manage Peer Access

3. Refer to *Section 3.1 Managing My Preproposals*, steps 3-6 above.

3.5.3 By Proposal

Upon selecting **By Proposal** on the "Manage Users" page, PAMS will load search parameters.

1. Enter the Agency Tracking Number, Grants.gov Tracking Number, Project Title (like), or Solicitation Number (like), and click **Search** to narrow your Proposal results
OR
Click **Search** with no parameters to search all Proposals submitted by your institution (Figure 33).

Figure 33. Manage Users, By Proposal

2. PAMS will navigate to the "Manage Users – Proposals" page. Browse the list or use the filters or advanced search above the grid to locate the Proposal for which you would like to manage peer access. Once you have located the Proposal, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 34).

Figure 34. Manage Users – Proposals, Manage Peer Access

3. Refer to *Section 3.3 Managing My Proposals*, steps 3-6 above.

3.5.4   By Award

Upon selecting **By Award** on the "Manage Users" page, PAMS will load search parameters.

1. Enter the Award Number (like) or Award Title (like) and click **Search** to narrow your Award results
OR
Click **Search** with no parameters to search all Awards for your institution (Figure 35).

Figure 35. Manage Users, By Award

2. PAMS will navigate to the "Manage Users – Awards" page. Browse the list or use the filters or advanced search above the grid to locate the Award for which you would like to manage peer access. Once you have located the Award, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 36).

Figure 36. Manage Users – Awards, Manage Peer Access

3. Refer to *Section 3.4 Managing My Awards*, steps 3-6 above.